





# Intro to Operations Hub

Appleton HUG

March 2022



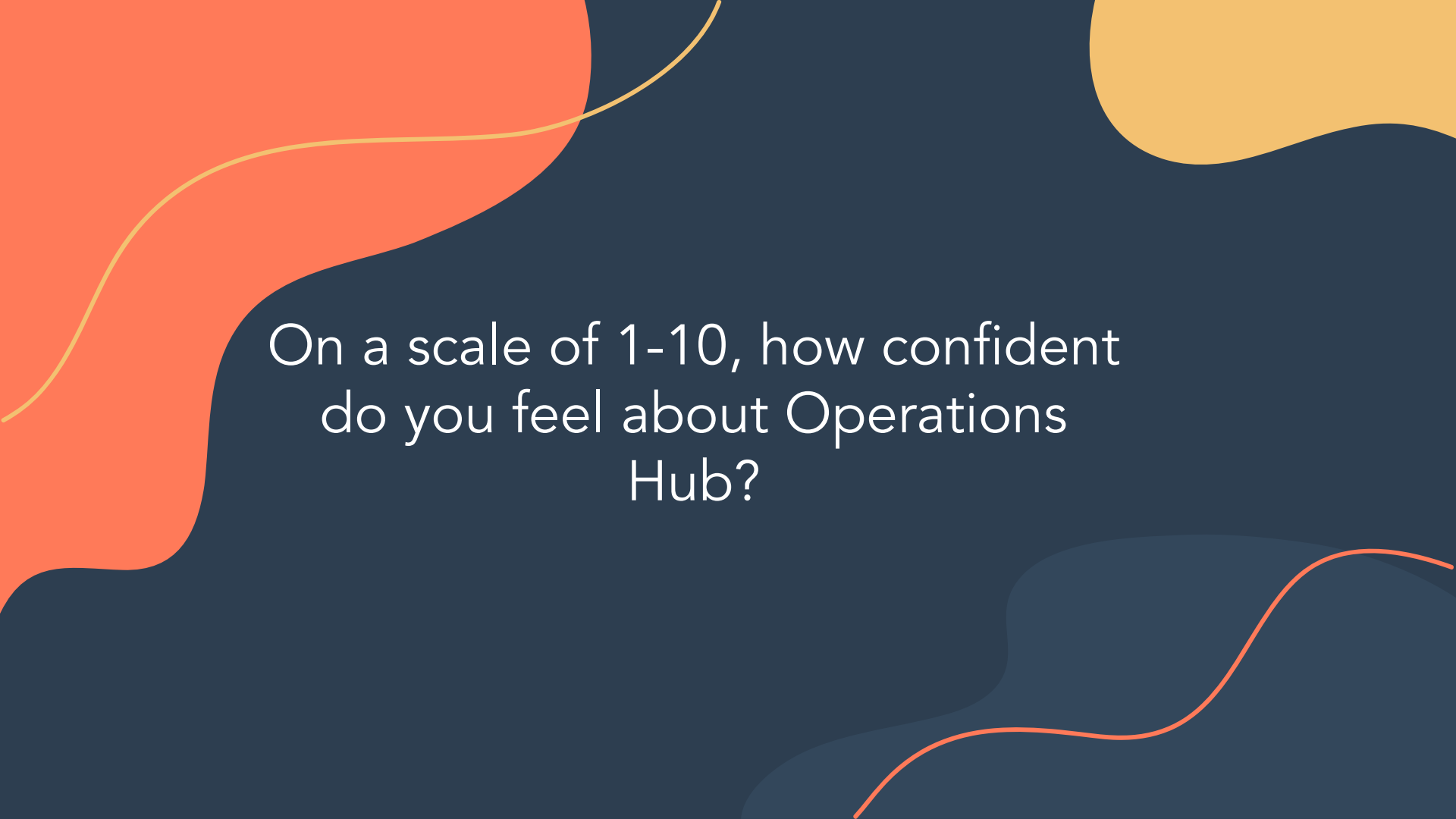
Best pro tip for attending a  
Packers game?



Is this your first  
HubSpot user group?



How long have  
you been using HubSpot?



On a scale of 1-10, how confident  
do you feel about Operations  
Hub?



## Ari Plaut

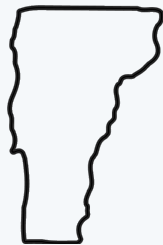
Principal Marketing Manager

[ari@hubspot.com](mailto:ari@hubspot.com)

Joined HubSpot in 2012

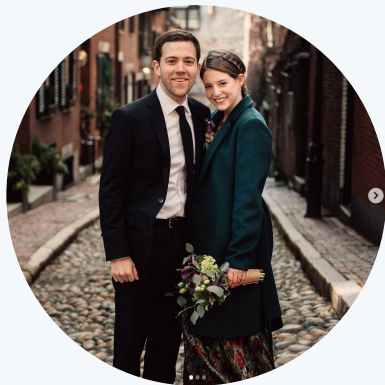
Sabbatical upcoming — taking suggestions!





Grew up in Vermont, USA.  
Addicted to ice cream.

Hiked all 48 high peaks in  
New Hampshire.



Married Jenna at city hall  
in Boston



Spent the last ~2 years in Ireland



Parents attended UW and  
got married there.  
Go Badgers!



# Agenda

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- Who (and what) does Operations Hub solve for?
- How does Operations Hub work?
  - Feature overview
  - Use cases
  - Best practices
- Q&A





Operations Hub supercharges HubSpot CRM with more robust and flexible data management tools.

Use it to more efficiently manage the movement and use of HubSpot data around your company, and streamline business processes in the CRM.





Operations Hub is built with ops professionals, data leaders, and HubSpot admins in mind.



...it's also built for "The HubSpot Person" that's asked to build, connect and fix everything in HubSpot for their company...



... and for the agency that often owns the health and wellbeing of their clients' database....





“Ops” isn’t always a defined role...

It’s the underlying set of systems, processes and responsibilities that help businesses of all sizes fight friction and grow better.



# At a high level, those are...



Platform

How can we get every team the info they need to do their jobs?



Process

Can we make that info consistent, efficient, and automated?



Perspective

How can we use all our data to drive business strategy?

All too often those  
"3 P's" are hard to  
manage!

And the people  
who own them are  
underappreciated.



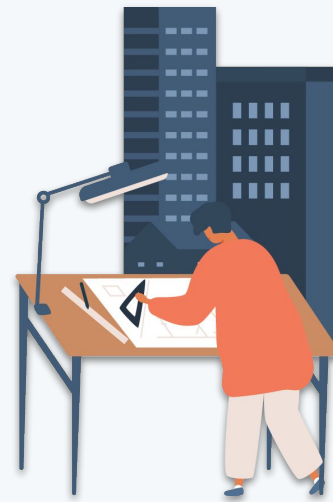


## Legacy Ops

Siloed and reactive.

Business runs slowly.

*Customer experience is fragmented.*



## Today's Ops

Ops is strategic.

Business runs seamlessly.

*Customer experience is flawless.*





Operations Hub can help get us there...



# Operations Hub

We built Ops Hub with the “3 Ps” in mind...



## Integrate (Platform)

- 100+ Data Sync apps
- Real time, two-way sync
- Historical sync



## Automate (Process)

- Custom Code Actions
- Data quality automation
- Scheduled workflow triggers



## Report (Perspective)

- Datasets
- Formula fields in reports
- Snowflake Integration



Use Data Sync in Operations Hub Starter (and Free) to integrate HubSpot with over 100 apps and eliminate data silos!

# Platform

# Data Sync

Real-time data sync between  
HubSpot and 100+ apps

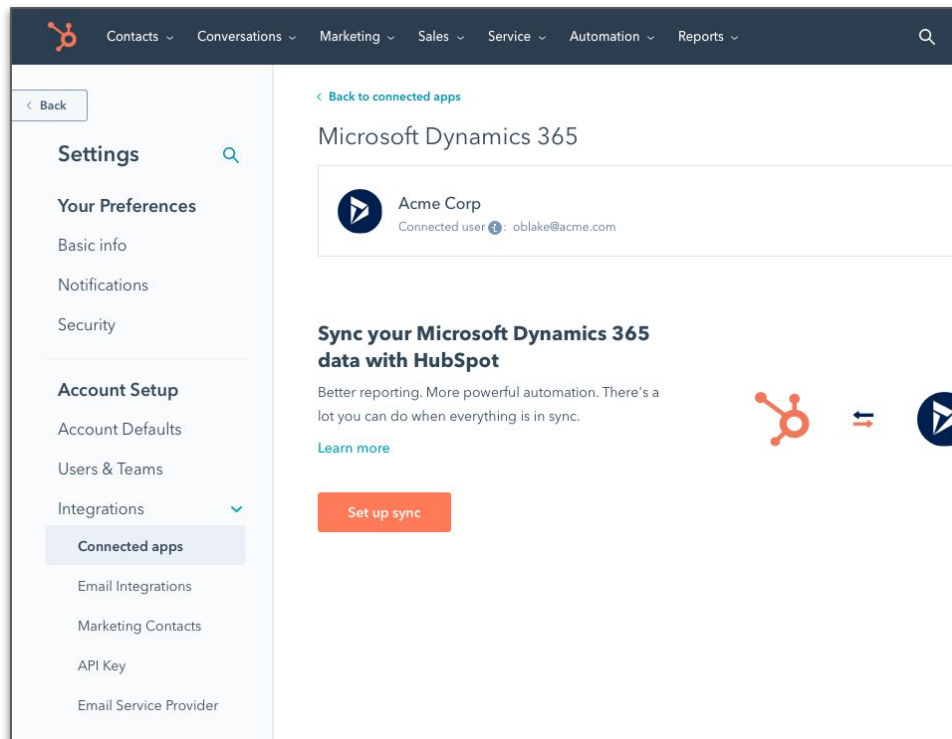
What makes these integrations different?

- Two-way sync
- Customizable
- Real-time
- Historical



Coming soon...

- Sync health
- New objects
- Even more integrations



# Data Sync Use Cases

You might...

- Have several apps in your tech stack
- Be unable to migrate everything to HubSpot
- Not need to build an integration from scratch

So you'd use Sync to...

- Send MQLs (and deals!) from HubSpot to Dynamics
- Sync contacts from Intercom to HubSpot
- Sync billing contacts from HubSpot to Xero

The screenshot shows the 'Contact sync' configuration page for 'Dynamics | Acme corp'. It features two tabs: 'Sync rules' (active) and 'Field mappings'. The 'Sync rules' section includes a 'Choose which records sync' section with a 'Dynamics contacts' box (containing 'All contacts') and a 'HubSpot contacts' box (containing 'All contacts'), connected by a 'Two-way sync' button. Below this is a 'Set Lifecycle stage' section with a 'Microsoft Dynamics' box (containing 'When a contact syncs') and a 'HubSpot' box (containing 'Set lifecycle stage as SQL'). At the bottom is a 'Match up contacts' section with a checked checkbox for 'Only sync contacts with an email address'. A footer note explains that syncing only contacts with an email address prevents duplicate records.

**Contact sync**  
Dynamics | Acme corp

**Sync rules** | Field mappings

**Choose which records sync**  
Create filters to sync only the data you want. You can use any Microsoft Dynamics field or HubSpot list.

**Dynamics contacts**  
These Dynamics contacts will sync to HubSpot.  
✓ All contacts

**Two-way sync**

**HubSpot contacts**  
These HubSpot contacts will sync to Dynamics.  
✓ All contacts

**Set Lifecycle stage**  
Assign a lifecycle stage to HubSpot contacts when they're created or updated by Dynamics contacts

**Microsoft Dynamics**  
▶ When a contact syncs

**HubSpot**  
Set lifecycle stage as SQL

**Match up contacts**  
☒ Only sync contacts with an email address

Syncing only contacts with an email address prevents duplicate records from being created. That's because all HubSpot contacts are identified by a unique email address. Without one, we can't automatically stop duplicates from happening. [Learn more](#)

## What We're Hearing From Customers:

"With Operations Hub, we can intuitively control the way our data flows between HubSpot and Dynamics 365 without the hassle of going to a third-party tool to establish every detail needed to sync. It saves the marketing and sales teams hours of work.

"

- Benjamin, Eastridge

## 1-minute Demo: Google Contacts Sync



Question (chat)  
What's at the top of your  
integration wish list?







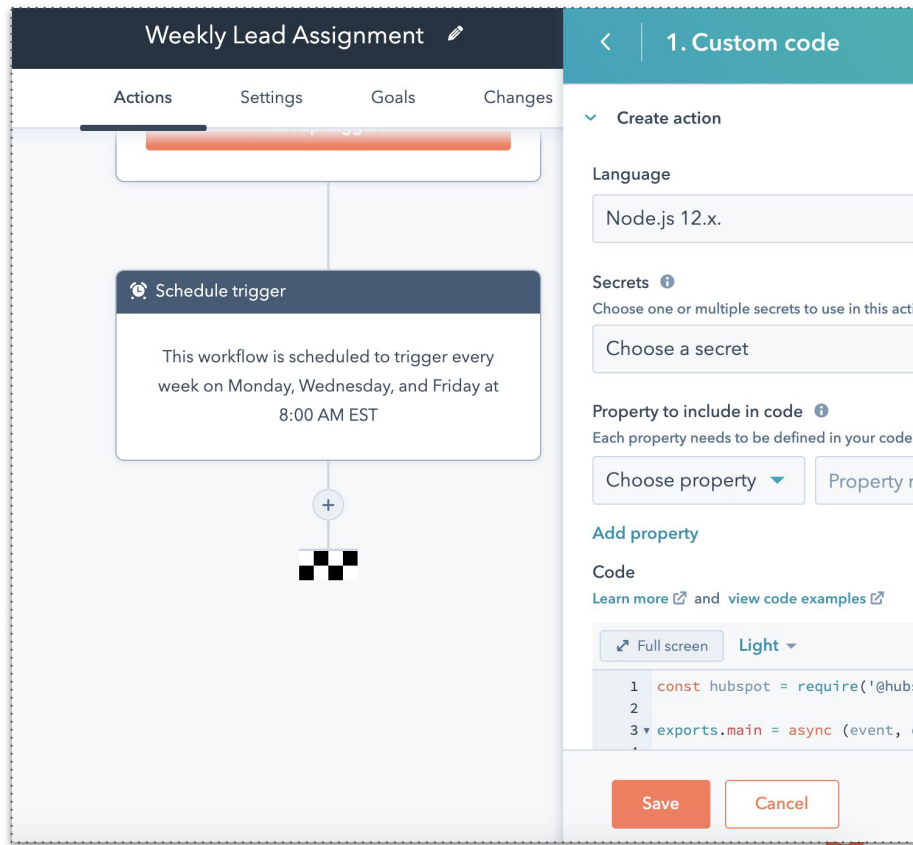
# Process

Operations Hub Pro unlocks advanced business process automation with sophisticated workflow features.

# Custom Code Actions

Custom Code Actions allow you to write and deploy code from within a workflow or bot action.

They're intended to solve for almost everything standard workflow action can't.



# Use cases for Custom Code Actions

Tons!

- Data management (deletion, deduplication, object association)
- Advanced lead rotation (e.g. based on Zip codes stored elsewhere, capacity, etc.)
- Data enrichment (pull from a third-party database, like Zillow or Clearbit)
- And much more...

I borrowed all of these from our new [Programmable Automation Use Case Library](#).  
Check it out!





## What We're Hearing From Customers:

“Programmable automation makes HubSpot infinitely flexible. We've used it to build even the most advanced business processes in HubSpot — from ERP integrations to data enrichment.

”

- Connor, Aptitude8

# Writing code can be tough...

Use your resources!

1. Use case library
2. Dedicated TC blocks
3. HubSpot partners
4. Each other!

There's help available for custom code projects,  
with or without internal dev resources!




# Scheduled Workflow Triggers

Recurring workflows!

Use cases:

- Task creation
- Email newsletters
- Custom integrations
- Data cleanup

Funnel Clean-up Reminders 

Templates NEW

ed

workflow that triggers based on

sed

orkflow that triggers based on

workflow that triggers based on

**How do you want this workflow to start?**

☐ Blank workflow  
Choose your own triggers and actions.

☒ **Schedule**  
Set up a recurring trigger that repeats actions at a specific date and time.

**Schedule \***


Weekly


**Day of week \***

Monday X

Wednesday X

Friday X

**Time of day \* **

 8:00 AM EST

☐ Specific date  
Start on a specific date like a webinar, conference, or other event.

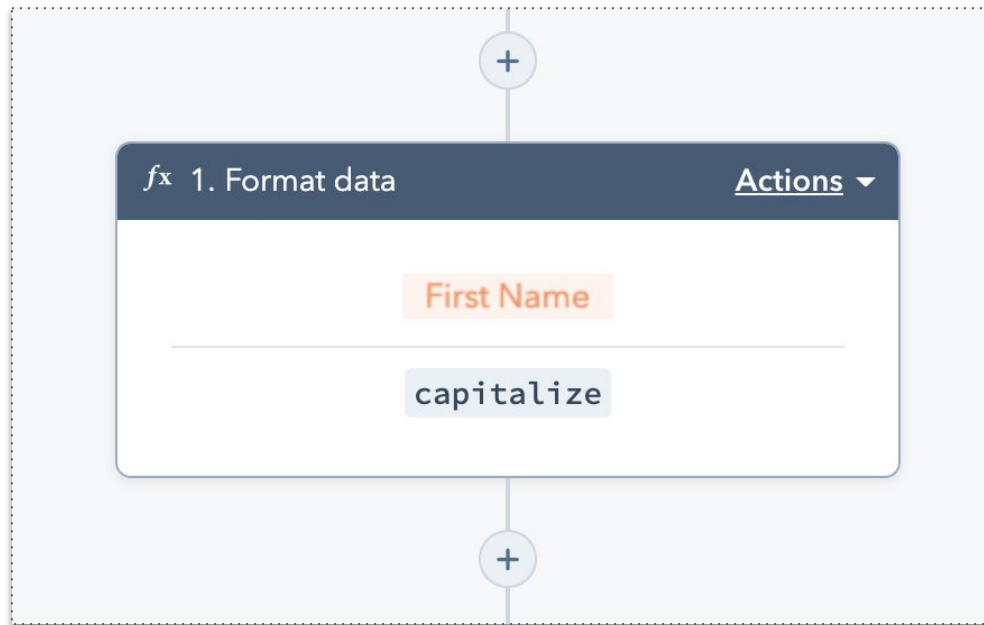
☐ Contact date property

# Data Quality Automation

Dirty data in your CRM costs time and money - we're here to help.

Use cases:

- Text string formatting
- Date formatting
- Add/subtract time
- Simple arithmetic
- And much, much more!





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Super simple use case for Scheduled Triggers + Data Quality Automation...

A weekly workflow that ensures all contacts' first and last names are capitalized



Question (chat):  
What's one process you've  
always wanted to automate?





Ops Hub Enterprise supercharges reporting, making it easy for *everyone* to unlock insights in their CRM.

# Perspective

# Datasets

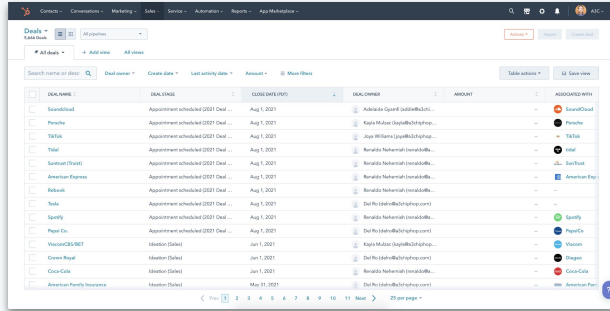
Reusable tables that save your team time, and enable fast, easy, consistent reporting.

Datasets essentially does two really, really cool things:

1. Calculations. Unlocks the ability to create advanced calculations in reports and fully customize your source data
2. Curation. Makes it easy for the average user to build reports.

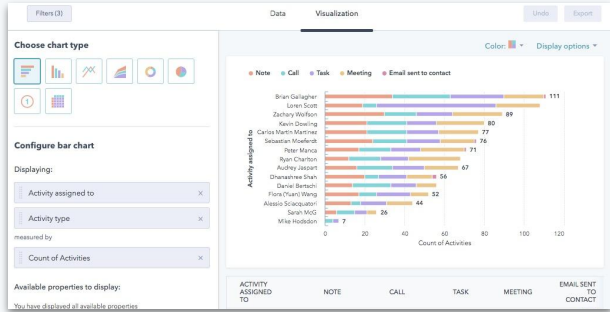


# First - how do Datasets fit into reporting?

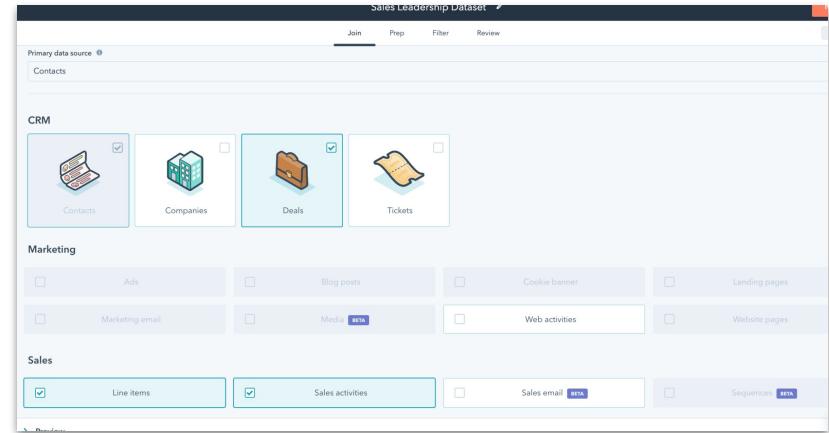


SEARCH NAME OR ID	DATE	CONTACT	ASSOCIATED WITH
SoundCloud	Appointment scheduled (2021) Deal	Aug 1, 2021	SoundCloud
Periscope	Appointment scheduled (2021) Deal	Aug 1, 2021	Periscope
TikTok	Appointment scheduled (2021) Deal	Aug 1, 2021	TikTok
Tidal	Appointment scheduled (2021) Deal	Aug 1, 2021	Tidal
Spotify (Track)	Appointment scheduled (2021) Deal	Aug 1, 2021	Spotify
American Express	Appointment scheduled (2021) Deal	Aug 1, 2021	American Express
Atlassian	Appointment scheduled (2021) Deal	Aug 1, 2021	Atlassian
Teal	Appointment scheduled (2021) Deal	Aug 1, 2021	Teal
Spotify	Appointment scheduled (2021) Deal	Aug 1, 2021	Spotify
Page One	Appointment scheduled (2021) Deal	Aug 1, 2021	Page One
VisionCRM	Meeting (Deal)	Jun 1, 2021	VisionCRM
Crown Royal	Meeting (Deal)	Jun 1, 2021	Crown Royal
Good Call	Meeting (Deal)	Jun 1, 2021	Good Call
RevenueCloud	Meeting (Deal)	May 31, 2021	RevenueCloud

## 1) Raw data created in CRM



## 3) User easily builds a report using that Dataset



## 2) Ops/Analyst preps & narrows down available data in a Dataset



# Datasets

## Advanced data prep!

### Use cases...

- Calculate custom KPIs
- Customize property names
- Use functions to manipulate data

### For example...

- Commissions, margins, ROI
- Custom date reporting
- Merge/truncate text

The screenshot displays the 'Sales Leadership Dataset' interface. At the top, there are tabs for 'Join', 'Prep' (which is active), 'Filter', and 'Review'. Below the tabs, the 'Prep' section is divided into three main areas:

- Left Panel:** A search bar contains the word 'amount'. Below it, it says '9 results from: 4 sources'. A list of categories is shown: 'Contacts' and 'Deals'. Under 'Deals', several properties are listed: 'Recent deal amount', 'Amount', 'Amount in company currency', 'Closed Deal Amount', 'Closed Deal Amount In Home Currency', 'Forecast amount', and 'Weighted amount'.
- Middle Panel:** Titled 'Fields', it shows a list of selected fields: '# Annual Recurring Revenue', 'Close date', 'Deal owner', and '# Amount (MRR)'. There is a '+ Create new field' button at the top and a 'Drag properties here' box at the bottom.
- Right Panel:** Titled 'Name', it shows 'Annual Recurring Revenue'. Below it, the 'Formula' section shows 'Insert: HubSpot' and a formula snippet '[DEAL.amount]'. There is an edit icon next to the title.

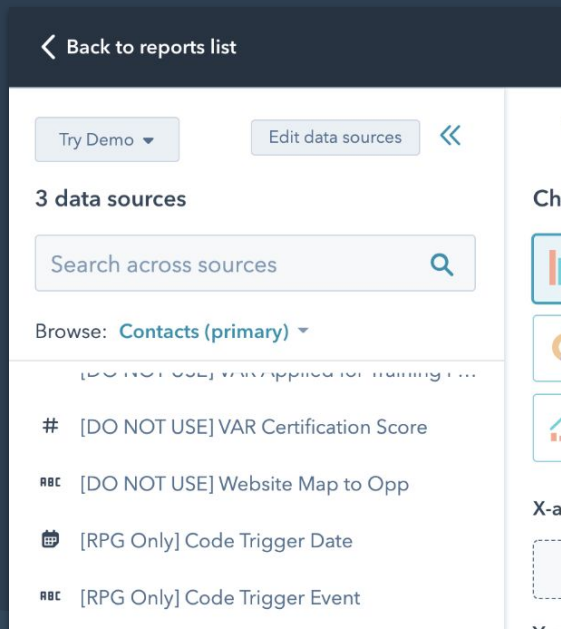
At the bottom of the interface, there is a 'Preview' button with a right-pointing arrow.

## Before:

812 properties, many obsolete.

Confusing names.

Missing context.

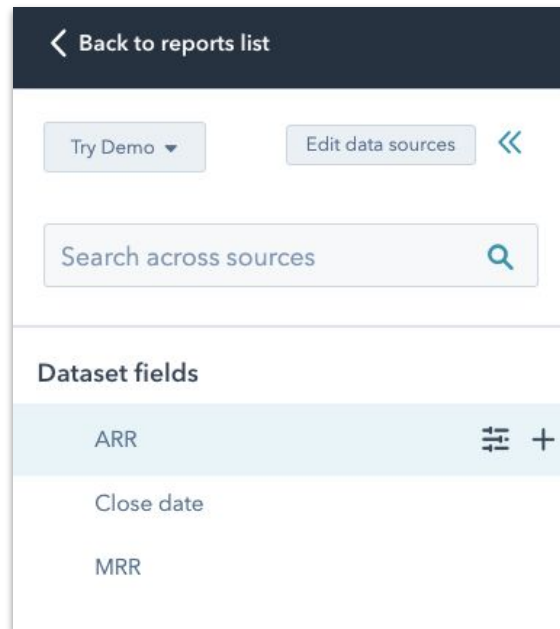


## After:

3 properties, all relevant.

Clear names.

Full context, including calculations.



2-minute demo:

Dataset of Target Account Deals





What's one  
calculation you'd  
like to run in a  
report?

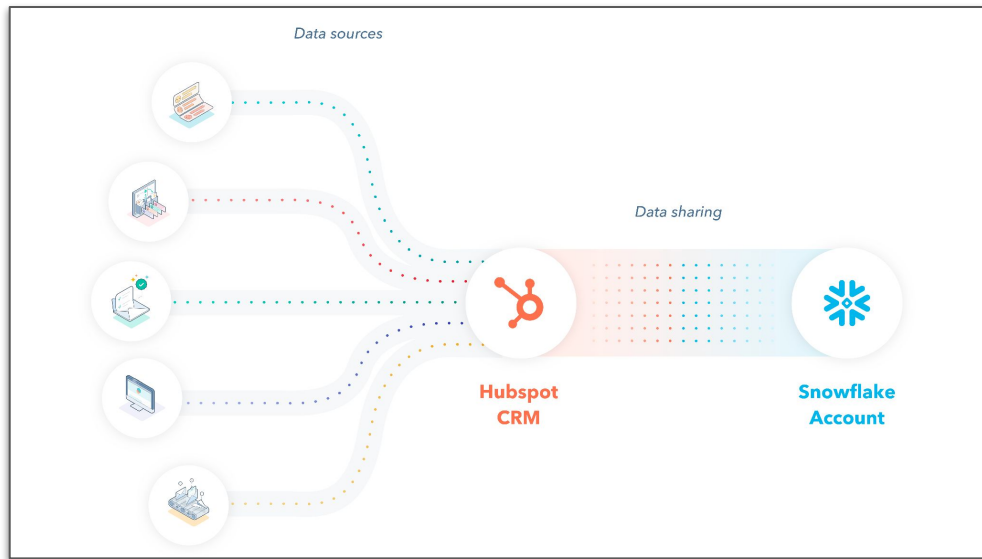


# Snowflake Data Share

The Snowflake integration is a great way to fit HubSpot into your existing reporting flow.

It allows you to pass your HubSpot data to Snowflake so you can curate and analyze your HubSpot data within your existing data stack.

Some regional restrictions exist, but we're working on expanding coverage in 2022.





## Pricing & Packaging

### Free

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HubSpot Sync  
Two Way Data Sync  
Default Field Mappings

Ecosystem Integrations  
All 3rd Party Integrations

CRM Extensions

### Starter \$50/month

Free +

HubSpot Sync  
Custom Field Mappings  
for Data

### Professional \$800/month

Starter +

Programmable Automation  
Custom Coded Workflow  
Actions  
Custom Coded Bot Actions  
Webhooks  
Data Quality Automation  
Scheduled Workflow  
Triggers

Additional Portal Capacity

### Enterprise \$2,000/month

Professional +

Datasets  
Calculations in Reports  
Snowflake Data Share

Additional Portals Capacity  
Custom Objects



# Q&A